Silver Flag Exercise Site

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Purchase Requests and the Customer

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Overview

- Introduction / Objectives
- Categories / Definitions
- Explanation
- Sole Source Requirements
- Statements of Work

Objectives

- Identify the three major types of Purchase Request (PR) Packages
- Understand the AF Form 9 from a customer, finance, and contracting perspective

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Purchase Request (PR) Packages

- **Three Major Categories of PR Packages**
  - **Supplies**
    - **All property except land or interest in land**
  - **Non-Personal Services Less Than or Equal to $100,000 Annually**
  - **Non-Personal Services Over $100,000 Annually**

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The AF Form 9

- **AF Form 9 Request for Purchase**
  - **Government Purchase Card Purchase?**
    - **Guidance will be available**
  - **Required for obligation of funds**
  - **Certified requests lets Contracting Officer know money is available**

- **Steps required for certification of funds**
  - **Initiator (Draftee)**
  - **Approving Official**
  - **Pertinent Base Agencies**
  - **Comptroller (FM)**
  - **Contracting**

The AF Form 9 Specifications or Descriptions?

Specifications / Descriptions

- **Specifications**
  - **More In-Depth**
  - **Can be attached to AF Form 9 <$100K**

Descriptions

- **Less Involved Explanation**
- **Less Complex**
- **Not from vendor's quote**

Aspects of Good Specifications/Descriptions

1) **Minimum functional need of government**
2) **Encompasses all available products or services that meet actual minimum functional need**
3) **Stated in terms the market can satisfy**

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Notes to Customer

- **Your Form 9 Package should include/answer:**
  - **Does it require early contracting involvement?**
  - **What's the period of performance or delivery terms?**
  - **Who is a good POC for this requirement?**
  - **What's the delivery address?**
  - **What's the place of performance**
  - **Is government furnished property/equipment required?**
  - **Do you have a good description?**
  - **Are supplemental files required?**
  - **Are funds allocated?**

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Competitive Quote Requirements

- Quotes from at least 3 vendors
  - Contracting will solicit for proposals
- Need to confirm a POC, their address, and phone number
- Contracting will assist in finding you sources
- If cost/price is not the only evaluation criteria for a competitive purchase, an evaluation criteria must be provided, again, CONS will assist with this requirement

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Sole Source Requirements

- If the effort is less than $100,000 provide a
  - Best Value Determination for GSA purchases or
  - Sole Source Justification for open market purchases
- If effort is greater or equal to $100K a
  - Justification and Approval (J&A) is required
- Contracting personnel will be your “Business Advisor”
  - We’re here to assist you in this process

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Specific Make and Model Justification

- For purchases of specific make and model greater than $2.5K (CONUS) or $25K (OCONUS) a justification is required enabling Contracting to restrict competition
- Restricts make and model but not vendor
- Justification must contain/identify the following:
  - Minimum requirement, it's use and purpose
  - The product desired, and
  - Particular feature(s) of the product that are to meet your minimum needs
- Discuss what other products lacked, that they cannot be modified to meet the minimum needs and why no other product will meet the minimum needs

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Statement of Work (SOW)

- SOW should specify in clear, understandable terms the work to be done
- Requires an understanding of the goods or services that are needed and an ability to define what is required in specific terms
- For guidance go to the DoD “Handbook for Preparation of Statement of Work” or AFI 63-124 if the requirement is over $100,000

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Conclusion

A good Purchase Request (PR) package requires a number of different items and attention to detail. Your efforts will be made much easier by using Contracting's Customer Education Guide

Your Contracting professionals are standing by to assist you, the customer, to procure your requirements quickly, smartly, and legally …